Illinois Law Enforcement Training and Standards Board

Electronic Data Interchange (EDI)
User's Manual

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Office of
Information Technology

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INTRODUCTION

Welcome to the Electronic Data Interchange (EDI). EDI is used to electronically transmit and legally sign personnel additions, changes, deletions and firearm qualification dates relating to your department to the Illinois Law Enforcement Training and Standards Board (hereby known as the 'Board').

SIGNING UP FOR EDI

To sign up for EDI the Board will need to have a signed application mailed to us to have on-file. This application, as well as other general information, is available on the Board's "EDI Information" section of its website: http://www.ptb.state.il.us/edi_info.htm.

Once we have received this application and the information is verified, a username and password will be selected and emailed to the user, and the agency will be configured for the Board to receive records electronically. For EDI to work properly at least one person must have "signature authority" so that documents can be processed. If the case arises in which an agency does not have at least a single user with signature authority they will be reverted back to a non-EDI or "paper" agency.

It's also important to note that once your agency has moved to EDI your agency should only submit documents electronically. Unless otherwise directed to by Board staff, after signing up for EDI, sending in FORM Es in the old paper format may not update EDI records properly.

LOGGING ONTO EDI

The easiest way to log on to EDI is clicking "E.D.I." in the lower right hand corner from the ILETSB main page (http://www.ptb.state.il.us) or, alternatively, going directly to the logon page: https://www.ptb-edi.state.il.us/login.asp.

EDI Logon Page:

To log onto the system you simply need to enter your username (issued by the Board) and password.

Popups must be allowed for some portions of EDI to function properly. A message stating this is displayed on the first access of the system. Different web browsers handle this differently but, generally, you will be prompted and it is a best practice to permanently allow pop-ups from our site.

If your roster is significantly overdue you may be sent directly to the Agency Roster page upon logon. If you see this your roster is not up to date please click the "Previous Page" button to go to the MAIN MENU and submit any required FORM Es.

PASSWORD INFORMATION

When you first log onto the system, or when your password expires, you will be prompted to change your password. Please follow the on-screen directions at that time. Passwords will expire and need to be changed once a year.

Your password must be at least 6 characters long and contain at least one of each of the following: an upper case character, a lower case character, and a number character.

If you have forgotten your password you can receive this information via email by going here: https://www.ptb-edi.state.il.us/lost_password.asp and following the on-screen directions. You can either enter your username or email address to receive this information. All usage of this form is logged.

MAIN MENU DESCRIPTION

EDI Main Menu (the menu may differ depending on your level of access and role as an EDI User):

Electronic FORM E
A FORM E is the main form to process to Add, Separation or Change an individual's employment information for your department. This process is covered in significant detail later in this document (Jump to FORM E details section).

FORM E Review
This section is used to review recent FORM E submissions. You are also able to add a waiver to an existing FORM E in process. You can only add a waiver to an electronic FORM E for a

Agency Rosters
This directs you to a listing of your current roster records for your department. <u>This is also where you can sign your roster during each of the two annual verification periods (presently January and July).</u> To sign your roster simply go to this section, click "Legally Sign" and follow the on screen directions. The date at the top of this section will be updated to reflect your signature. If this section is not showing current and up to date information then please go back to the main menu by clicking "Previous Page" and process any FORM Es that are required ([Jump to FORM E details section](#)). You can also choose to print this document for your records by clicking Print (at the bottom of the listing of employees). Please keep in mind the following key points regarding signing your agency roster:
- Information on this roster must be both current and accurate before you sign this document.
- This signature is a legally binding act that ensures that the information is accurate.
- If your agency has Part-Time staff, the hours that the officer has worked, for the 6 month period that is covered ,must be entered in the Hours field.

Firearms Roster
This section is where you will enter your yearly dates for firearms qualifications. <u>Use the comments section for any caveats you may have (example: medical or military leave).</u> You can save this information as many times as you need but your agency is required to "Legally Sign" the document at least once a calendar year. When this happens the data is transferred to the Board's internal records for review. Please keep in mind the following key points regarding signing your firearms roster:
- Information must be both current and accurate before you sign this document.
- This signature is a legally binding act that ensures that the information is accurate for the period covered.

Change Password
You can change your password as often as you like. More information and password requirements are available in the [password section](#) of this document.

Certified Sites
This section is a directory for information on board certified sites throughout the state of Illinois.

List of Agencies
This section lists the different departments throughout the state of Illinois with contact, map and some demographic information.

Agency Information
This section will allow you update your location and contact information for the Board. You are able to see, but not edit, the information for other agencies here as well.

You can also control the number of lines printed per page on your agency roster by changing the "Lines per Roster" section. Due to differences in printers, drivers and possible configurations, it is impossible for EDI to offer support for every printer in use. The best we can do is help you adjust the number of lines printed per page. If the printer prints two pages, one full and another with only a few lines, decrease the number. If you have too much white space at the bottom of the page, increase the number. For most users 25 lines per pages works well.

If you have significant printing problems please feel free to contact us.

Administrator Functions
This section allows you to perform a variety of functions. It is described in detail below in the Administrator Functions section.

ELECTRONIC FORM E DETAILS

There are three types of FORM E documents: Appointment, Separation, and Status Change. ALL FORM E documents are <u>processed overnight</u>. Do not expect the changes you have made to be immediate.

FORM E starting page:

Appointment
Use this to add a new employee to your roster. Make sure the information on this and the following pages is accurate. Please also follow the information on the side panel (not displayed below due to size constraints) during this process for addition information about this process as well as waiver information.

FORM E Appointment page:

Electronic Form E - Bucci Heights Police Dept		
Last Name:	**First Name:**	**Middle Name:**
SSN:	**Date of Birth:**	
545-55-5555	/ /	
List Prior Last Names Used If Different Than Last Name (i.e., Name at Birth or Maiden Name):		
Sex:	**Race:**	**Highest Educational Level:**
○ Male	○ African American	○ High School
○ Female	○ Asian/Pacific Islander	○ Some College
	○ Caucasian/White	○ Associates Degree
	○ Hispanic	○ Bachelors Degree
	○ Native American	○ Masters Degree
		○ Doctorate
Rank/Classification	**Date of Appointment**	
Police Officer ⬍	6/6/2011	
This Individual's previous service as a peace/correctional officer was with agency:		
Name of Agency	**Date Hired(mm/dd/yyyy)**	**Separation Date(mm/dd/yyyy)**
	/ /	/ /

APPOINTMENT INFORMATION

Completion of LETSB Certified:
○ Law Enforcement Basic Training Course
○ Correctional Basic Training Course
○ Part Time Basic Training Course
○ Mandatory Firearms Training Course
○ Trained: State of Ill. or Federal Law Enforcement/Corrections
○ Trained Out Of State
○ The above-named person has NOT satisfied
  the basic training requirements.

Additional Comments:

[Submit] [Cancel]

Status Change

This is used to update ILETSB of a change in name, rank, or education. This section is NOT for changing an employee from Part to Full time (or vice versa). For information regarding performing those kinds of changes please refer to point 5 of the Important Reminders section.

Separation

This will remove an officer from your roster. Make sure that the rest of this pages information is accurate or you will be presented with an error stating that the person is not currently employed at your agency. If you received this message in error please contact us.

ADMINISTRATOR FUNCTIONS

This section allows you to perform functions that may have been forgotten at an earlier time or to quickly perform many of the functions on EDI.

Administrator Functions page:

As you can see from this page you can get a quick snapshot of anything that needs to be signed. If you have been notified by the Board that you need to log on and sign something then this is the correct place to go. It also allows for the quick signing of multiple FORM Es at a single time.

IMPORTANT REMINDERS

These topics have been covered throughout this manual but please keep these in mind when you use EDI:

1)   ALL FORM E documents are processed overnight. Do not expect the changes you have made to be immediate. If you have made changes and those changes have not been displayed in EDI after more than one day then check the Administrator Functions section to see if you have anything that is not signed. If you continue to have problems please contact us.

2)   Once you are an EDI agency it's important, unless instructed otherwise, to process all FORM E documents through EDI. If you process documents any other way it is likely that EDI will not be updated and will become out of date. If this happens you will need to contact us to get the records updated.

3)   If the case arises in which an agency does not have at least a single user with signature authority they will be reverted back to a non-EDI or "paper" agency. They will then receive a paper packet in the mail during the certification periods.

4)   Popups must be allowed for some portions of EDI. A message stating this displayed on the first access of the system. Different web browsers handle this differently but, generally, you should be prompted and it is a best practice to permanently allow pop-ups from our site.

5)   If you need to change an employee from full to part time (or part to full time), or to a completely different branch (Example: Law Enforcement to Court Security), you will need to enter two FORM E documents. The first will be a separation from the old position and the second will be an appointment to the new position. It is PARTICULARLY IMPORTANT that, while you can enter both these FORM Es at the same time, you must choose different effective dates (example: separation date of 7/20/2011 and an appointment date, in this case consecutively, on 7/21/2011). If both effective dates are the same the FORM Es will not process correctly.

6)   If you have an employee at your department performing two different roles (example: deputy sheriff and correctional) they will appear on your roster more than once – depending on the number of roles they have.

ILETSB CONTACT INFORMATION

Please contact ILETSB at 217-782-4540 with any problems you have. You can also email IT Staff at ptb.edi@illinois.gov. For IT Staff, email is the quickest response.

The Board's website is at located at www.ptb.state.il.us.